



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

3A James W. Little (Estate)

Case No. 08CEPR00870

Atty Keeler, William (of Garvey Schubert Barer, for Norma G. Little – Petitioner)

Atty Milnes, Michael A (for Christopher Brian Little – Executor/Respondent)

Status Hearing Re: Exoneration of Bond and Dismissal

DOD: 7/4/08

Cont. from 3/7/12,
3/21/12, 042312,
061112

Aff.Sub.Wit.

Verified

Inventory

PTC

Not.Cred.

Notice of
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Aff.Mail

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Pers.Serv.

Conf.
Screen

Letters

Duties/Supp

Objections

Video
Receipt

CI Report

9202

Order

Aff. Posting

Status Rpt X

UCCJEA

Citation

FTB Notice

This Status Hearing was set by the Court on 1/11/12, on the Petition to Remove Executor (see Page 1A).

Minute Order 1/11/12 states: Ms. Berger-Hoang and James Clark are appearing via conference call as well as Ken Peace. Ms. Burnside informs the Court that a settlement was submitted to the court in Arizona.

NEEDS/PROBLEMS/COMMENTS:**PAGE 3A IS OFF CALENDAR**

Minute Order 6-11-12: Mr. Keeler informs the Court that he is also appearing specially for Mr. Knudson. Matter continued to 8-2-12. The bond remains in place.

PAGE 3B is the final account of Christopher Brian Little that requests distribution to the successor personal representative of the AZ estate and discharge of Petitioner's surety in this estate.

Reviewed by: NRN / skc

Reviewed on: 7-25-12

Updates:

Recommendation:

File 3A – Little

3A

Petition for Approval of Trustee's Second Account Current, for Approval of Trustee's Fees and for Authorization to Compensate Counsel for the Trustee

Age: 16 DOB: 06/05/96		RONALD DICKEN, PATRICIA DICKEN, KAREN STEELE, and CHRISTOPHER KENNEDY, Co-Trustees with bond of \$460,000.00, are Petitioners. Account period: 05/01/11 – 04/30/12 <table> <tr> <td>Accounting</td> <td>-</td> <td>\$430,894.49</td> </tr> <tr> <td>Beginning POH</td> <td>-</td> <td>\$413,369.22</td> </tr> <tr> <td>Ending POH</td> <td>-</td> <td>\$415,383.84</td> </tr> </table> (\$46,319.22 cash plus securities) <table> <tr> <td>Trustees</td> <td>-</td> <td>\$3,100.27</td> </tr> </table> (0.75% of the assets of the trust annually, paid quarterly. Trustees have already been paid \$3,093.00 for this account period. Balance of \$7.27 is due.) <table> <tr> <td>Attorney</td> <td>-</td> <td>\$2,112.00</td> </tr> </table> (for 15.1 hours of Professional services for a total of \$1,678.00 and \$434.00 for costs advanced.) Bond is currently \$460,000.00. The Trustees estimate that income in the coming year will be approximately \$15,000.00. Petitioners state that bond should therefore be increased to \$475,000.00. (ok) Petitioners pray for an Order: <ol style="list-style-type: none"> 1) Approving, allowing and settling the second account; 2) Approving the Trustee fees; 3) Increasing the bond to \$475,000.00; and 4) Authorizing the attorney fees and costs. 	Accounting	-	\$430,894.49	Beginning POH	-	\$413,369.22	Ending POH	-	\$415,383.84	Trustees	-	\$3,100.27	Attorney	-	\$2,112.00	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> The Herzog Trust is not a Special Needs Trust. The purpose is to supplement rather than supplant the financial support provided to Lauren, a minor, by her parents by providing extra and supplemental goods and services, and to discharge such income and other tax liabilities as she may incur. Petitioners state that since Lauren is at increased risk for kidney replacement surgery, the general philosophy of the Trustee has been to preserve the corpus of the Trust to pay for such surgery should it become necessary. Because Lauren's ordinary needs are met by her parents, very few disbursements and no distributions were made during this account period. <u>Note:</u> A status hearing will be set as follows: <ul style="list-style-type: none"> • Friday, 09/27/2013 at 9:00a.m. in Dept. 303 for the filing of the third account. Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.
Accounting	-		\$430,894.49															
Beginning POH	-		\$413,369.22															
Ending POH	-		\$415,383.84															
Trustees	-		\$3,100.27															
Attorney	-		\$2,112.00															
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	Citation																	
	FTB Notice																	

Reviewed by: JF
Reviewed on: 07/25/12
Updates:
Recommendation:
File 4 - Herzog

Petition of Trustee for Approval of Second Account Current, for Approval of Trustee's Fees, for Authorization to Compensate Counsel for the Trustee, and for Authorization to Expend Trust Funds for Travel

Age: 13 DOB: 12/19/98		<p>RONALD DICKEN, PATRICIA DICKEN, KAREN STEELE, and CHRISTOPHER KENNEDY, Co-Trustees with bond of \$465,000.00, are Petitioners.</p> <p>Account period: 05/01/11 – 04/30/12</p> <p>Accounting - \$429,120.44 Beginning POH - \$415,602.74 Ending POH - \$400,463.79 (\$51,405.10 cash plus securities)</p> <p>Conservator - \$3,117.00 (0.75% of the assets of the trust annually, paid quarterly. Trustees have already been paid \$3,132.00 for this account period which resulted in an overpayment of \$15.00. Petitioner refunded \$8.00 on 07/06/11, but still owes \$7.00, which will be shown as a receipt in the next account.)</p> <p>Attorney - \$2,666.00 (for 19 hours of Professional services for a total of \$2,232.00 and \$434.00 for costs advanced.)</p> <p>Bond is currently \$465,000.00. The Trustees estimate that income in the coming year will be approximately \$15,000.00. Petitioners state that bond should therefore be reduced to \$460,000.00. (ok)</p> <p>Petitioners state that Christopher has requested that his parents take him to Alaska because he studied Alaska the previous school year. Petitioners feel this activity is appropriate and beneficial for Christopher and request authorization to expend Trust funds to reimburse Christopher's parents \$3,556.00, the cost of passage for Christopher and one parent.</p> <p>Petitioners pray for an Order:</p> <ol style="list-style-type: none"> 5) Approving, allowing and settling the second account; 6) Approving the Trustee fees; 7) Reducing the bond to \$460,000.00; 8) Authorizing the attorney fees and costs; and 9) Authorizing the attorney to expend trust funds to reimburse Christopher's parents \$3,556.00 for travel to Alaska. 	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: A status hearing will be set as follows: • Friday, 09/27/2013 at 9:00a.m. in Dept. 303 for the filing of the third account.</p> <p>Pursuant to Local Rule 7.5 if the required documents are filed 10 days prior to the hearings on the matter the status hearing will come off calendar and no appearance will be required.</p>	
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		<p>Reviewed by: JF</p> <p>Reviewed on: 07/25/12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 5 - Martin</p>		